

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

13. Amend a Purchase Order

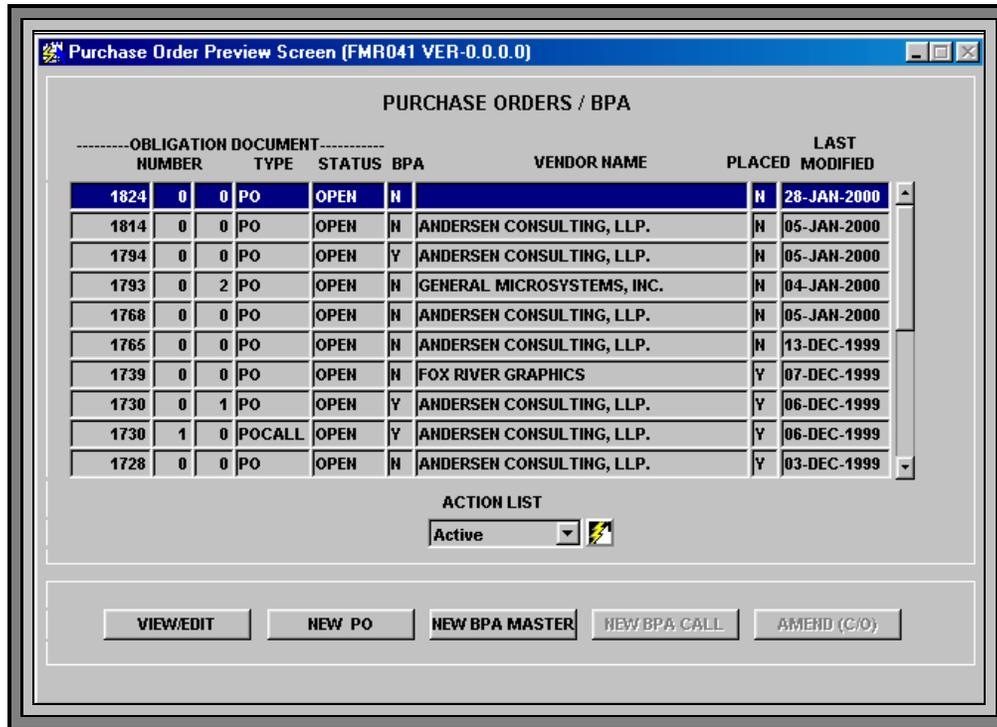
- 13.1 Introduction** This procedure describes the process to amend a purchase order in CSPS. A purchase order modification is required for any unilateral or bilateral written alteration. The purchase order modification data is entered via the CSPS “Purchase Order Screen” (FM041).
- 13.2 Who Performs the Procedure** Buyers will primarily be responsible for entering changes to purchase order modifications.
- 13.3 Initiating the Process** The process begins once a purchase order is awarded and it becomes necessary to change information about the delivery point, rate of delivery, performance period, price, quantity, or any other provision of the existing purchase order.
- 13.4 Accessing the System** From the Main Menu, select Transaction. From the Transaction menu, select Procurement. From the Procurement menu, select “FM041- Purchase Order”. Follow the steps below for FMR041 and FM041.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

- 13.5** **Modifying Existing Line Item Data (Administrative Changes Only)** This procedure describes the steps necessary to modify information on an existing purchase order to incorporate necessary changes.
- Administrative changes require documentation which is acceptable to the Contracting Officer. An administrative modification is defined as any modification that does not increase the authorized funding (i.e., the funding defined by the requisition) above the tolerance levels.
- If a non-administrative modification is required (i.e., the authorized funding must be increased or a new line item is required), the requisitioner must either submit a new requisition that includes the affected line items or provide appropriate documentation in accordance with current policy. Once the buyer receives the new requisition, he/she may cancel the affected line items on the current purchase order (see procedure “Section 13.6 - Canceling a Document/Line Item”) and tie the new requisition line items to the modified purchase order (see procedure “Section 13.7 - Adding a New Line Item”). In addition, the buyer may create a second line item not tied to a requisition line item or a RFQ (see procedure “Section 11.5 - Entering a Purchase Order (not Based on a Requisition or RFQ)”.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

FMR041 -Purchase Order Preview Screen



STEP	ACTION
FMR041 - Purchase Order Preview Screen	
1.	Highlight the document to be amended.
2.	Click on the AMEND/CO button.
3.	FM041 appears.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

FM041 p1 - Purchase Order Modification

STEP	ACTION
FM041 p1-The Main Screen	
4.	The MOD field should default in with a check to indicate that the order is a modification (change order) to the original/existing purchase order.
5.	In the OBLIG # field, the applicable document number should appear. Note: Upon each modification of the purchase order, the change order number will automatically increase sequentially.
6.	Enter the necessary modifications. For assistance on how to access a field and select the appropriate information, refer to the procedures outlined in “Section 11.5 - Entering a Purchase Order”. Note: Although the system will allow the buyer to modify most fields, it will not allow the buyer to modify the vendor name and/or address. Vendor name and/or address changes must be coordinated with finance personnel so that finance may enter these changes into the system.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION
7.	After the necessary modifications have been made, in the APPROVED field, click the field or press the space bar to indicate that the document is complete and that the reporting/approval process can begin. The system will display the applicable reporting screen for the original purchase order. See Procedures “Section 11.11 - Completing the SF-281 Report” or “Section 11.12 - Completing the CD-409 Report” to complete the reporting information.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

13.6 Canceling a Document/Line Item This procedure describes the steps necessary to cancel either a document or a specific line item by reducing the current quantity to "0".

Note: If a non-administrative change must be made to one or more line items, the requisitioner must submit a new requisition for the affected line items or provide appropriate documentation in accordance with current policy. Once the buyer receives the new requisition, he/she must cancel the affected line items on the current purchase order and then link the new requisition line items to the purchase order.

STEP	ACTION
FMR041 - Purchase Order Preview Screen	
1.	Highlight the document to be amended.
2.	Click on the AMEND/CO button.
3.	FM041 appears.
FM041 p1-The Main Screen	
4.	The MOD field should default in with a check to indicate that the order is a modification (change order) to the original/existing purchase order.
5.	In the OBLIG # field, the applicable document number should appear. Note: Upon each modification of the purchase request, the change order number will increase sequentially.
6.	Click the "NEXT" button to access the FM041 p2 screen (i.e., the Line Item Screen).

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION	
FM041 p2-Line Item level.		
	IF...	THEN...
7a.	If the PR field = 'Y', indicating that this line item is linked to an RFQ/requisition line item ...	<ul style="list-style-type: none"> a. Double click on the PR field. The FM041e window will appear. b. Click the 'CANCEL THIS TRANS' button. c. In the FINAL field, click on the field or press the space bar to insert a check. d. Click the PREV button to return to FM041 p2. e. Tab through the UNIT and UNIT PRICE fields to verify that the ITEM TOTAL field updates to \$0.00.
7b.	If the PR field = 'N', indicating that this line item is not linked to an RFQ/requisition line item ...	<ul style="list-style-type: none"> a. Place the cursor in the QUANTITY field. Change the amount to zero. b. Tab through the UNIT and UNIT PRICE fields to verify that the ITEM TOTAL field updates to \$0.00.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION
8.	<p>In the ACCS field, double click on the field and the FM041b screen will appear. Verify that the system has automatically updated the MDL information based on the '0' quantity. If the system has not updated the MDL information, perform the following steps for each MDL.</p> <p>a. In the % field, enter the applicable percentage for the MDL.</p> <p>b. Tab through the other fields on the screen. The system should update the MDL amount to \$0.00.</p> <p>Once all of the MDL information reflects the line item cancellation, click the "PREV" button to return to the FM041 p2 screen.</p>
9.	<p>Repeat Steps 7 - 8 for each line item that must be canceled. If the entire purchase order must be canceled, repeat Steps 7 - 8 for each line item on the purchase order.</p>
10.	<p>Click the "PREV" button to return to the FM041 p1 screen.</p>
11.	<p>In the APPROVED field, click the field or press the space bar to indicate that the document is complete and that the reporting/approval process can begin. The system will display the applicable reporting screen for the original purchase order. See Procedures "Section 11.11 - Completing the SF-281 Report" or "Section 11.12 - Completing the CD-409 Report" to complete the reporting information.</p>

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

- 13.7 Adding a New Line Item.** This procedure describes the steps necessary to add a new line item to an existing purchase order. Line items will need to be added to address non-administrative changes and to identify charges that appear on the invoice that were not originally included on the purchase order (e.g., freight).

STEP	ACTION
FM041 - Purchase Order Preview Screen	
1.	Highlight the document to be amended.
2.	Click on the AMEND/CO button.
3.	FM041 appears.
FM041 p1-The Main Screen	
4.	The MOD field should default in with a check to indicate that the order is a modification (change order) to the original/existing purchase order.
5.	In the OBLIG # field, the applicable document number should appear.
6.	Click the “NEXT” button to access the FM041 p2 screen (i.e., the Line Item Screen).
7.	Use the keyboard “down” arrow to insert a ‘blank’ line item after the last purchase order line item. Note: The “Create” and “Down Arrow” icons in the toolbar will not insert a ‘blank’ line item while entering a purchase order modification.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION	
	IF...	THEN...
8.	The Buyer would like to add a line item based on a requisition or an RFQ...	<ul style="list-style-type: none"> a. In the PR field, enter a ‘Y’ and double click to open the “All Open Purchase Requests Screen” (FM050) and view the available requisition/RFQ line items. Once a line item from the applicable requisition is identified, double click on the QUANTITY field. This action will close the FM050 screen and open the Available Purchase Request Line Items (FM041e) screen. Click the “PREV” button to close the FM041e screen and return to the FM041 p2 screen. b. When the buyer returns to the FM041 p2 screen, all of the line item fields will be populated with the applicable data from the requisition. The buyer should follow the remaining steps outlined in procedure “Section 11.6 - Entering a Purchase Order Based on a Purchase Request (No RFQ)”. c. Repeat Steps 7 - 8 for each requisition line item that needs to be pulled onto the purchase order.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

STEP	ACTION	
9.	If the buyer opts to create a line item which is not based on a requisition or a RFQ ...	<p>Tab through the PR field. The buyer should follow steps 30 to 5 outlined in procedures “Section 11.5 - Entering a Purchase Order (not Based on a Requisition or RFQ)”.</p> <p>Repeat Steps 7 and 9 for each line item to be created on the purchase order.</p>
10.	Click the ‘PREV’ button to return to the FM041 p1 screen.	
11.	<p>In the APPROVED field, click the field or press the space bar to indicate that the document is complete and that the reporting/approval process can begin. The system will display the applicable reporting screen for the original purchase order. See Procedures “Section 11.11 - Completing the SF-281 Report” or “Section 11.12 - Completing the CD-409 Report” to complete the reporting information.</p>	